**Sr. PM Cohort Project Team Charter**

**1. Purpose and Key Responsibilities**

What is our purpose; why do we exist?

* We are the Sr. PM Cohort team assigned to complete the PM Certification project.
* Design and develop a PM Certification program that will give incoming and possibly current PMs the skills that they need to excel in their positions.  The main focus of the project will be to determine the skills necessary and develop them into a format that will allow for maximum learning and retention.  This program will be scheduled to pilot in Q3 2016.

What are our key responsibilities as a team?

* Work with project coach and sponsor to define, manage, and complete this project.
* Collaborate as a team to successfully complete the Sr. PM Certification project.
* Leverage our in-depth knowledge and complimentary skills to bring value to all stakeholders.
* Role model the appropriate competencies, processes, and tools for the PM role.

What are others counting on us to do?

* Provide recommendations and action plan designed to:
  + Align to the aspirational view of PM role
  + Improve the new to role experience for Program Managers
  + Provide PM’s with the knowledge, skills, and tools to succeed in role
  + Shorten time for PM job readiness
  + Create a mechanism for cross-college consistency in PM knowledge, tools, processes, etc.

**2. Vision**

What do we want to accomplish, achieve, or create as a team?

* As PM’s, we are uniquely positioned to provide sound recommendations for improving many facets of PM job readiness. We will leverage our collective experience, knowledge, skills, and abilities to design a cogent “new to role experience” for CU PM’s.

What will be the impact of our collective efforts?

* New PM’s will have a much better new to role experience and will receive formal training for their job making them both more effective and efficient, adding value to the business

**3. Values**

What are the most important values that we will adopt to guide our actions and decisions as a team?

* Creating a “safe” environment for collaboration (brainstorming, feedback, review, etc.)
* Conflict is positive – fosters creativity, seeing different perspectives, etc.
* Team participation, please be sure to respond to tasks and deliverables.
* Forward thinking, forward doing…don’t let ourselves get bogged down in the here and now.

What are the specific behaviors that describe each value?

* Creating a “safe” environment
  + Demonstrate professional courtesy and respect towards each other
  + Encourage dissenting or non-conforming views to heard
* Conflict is positive
  + Identify conflict as it occurs and call it out as a growth opportunity
  + Respond to managing conflict in a constructive and optimistic way
  + Consider conflict as a bellwether that something important is happening
* Team Participation
  + Complete tasks and deliverables as assigned
  + Be on-time and prepared for team meetings/activities
  + Actively engage in discussion and decisions
* Forward thinking, forward doing
  + Maintain an enterprise perspective of the project and align our efforts accordingly
  + Be decisive and make decisions that align with our goals and vision
  + Recognize when we get stuck or hit roadblocks and actively seek ways to continue driving momentum.

**4. Goals**

What are our shared team goals and deliverables?

* Create Project and Team Charters
* Provide recommendations to leadership

How will we measure success?

* Project completion

**5. Roles and Responsibilities**

What are our individual skills and functional areas of responsibility?

***Team Roles***

* Jess – Notes and logistics
* Darrell – Meeting agendas
* Jason – Maintain Team and Project Charters

***Project Roles***

TBD

***Team Skills Inventory***

**Jason**

*Strengths:*

* Planning, forecasting and estimating
* Project management
* Organizing and leadership
* Task and time management
* Research and analysis
* Problem solving
* Writing and editing
* Quality assurance
* Statistics and numbers!
* High energy and enthusiastic
* Competitive work horse
* 100% real and very transparent

*Opportunities*:

* Not very “creative” – I’m the logical and “wise” thinker…but not very creative.
* Lack some political savvy – I’m not good at reading between lines or calling ugly babies beautiful.
* Create high standards and expectations – can be seen as a “driver” or “pace setter”
* Openly critical – I tend to focus on “what’s wrong” because I’m a fixer, which sounds like criticism.
* Interacting effectively with people who are indirect and/or non-transparent.
* Emotional intelligence – I can get emotional and defensive in certain situations...working on my triggers.
* Demotivated by ambiguity or ambivalence; I need clear vision and direction.

**Barb**

*Strengths*:

* Good verbal and written communicator
* Handle difficult conversations well
* Forward thinking
* Previous leadership experience
* Influential

*Opportunities:*

* Get frustrated when people don’t respond in a timely manner or follow through
* Business Services my whole Comcast career (narrow view of CU)

**Darrell**

*Strengths:*

* Researching
* Flexible
* Open-minded
* Patient
* Team Oriented
* Problem Solver

*Opportunities:*

* Communication
* Time Management

**Dana**

*Strengths*:

* Written communication
* Written vocabulary
* Project management
* Task Oriented
* Operations minded

*Opportunities:*

* Get Frustrated
* Data Analysis

**Jess**

*Strengths:*

* Organization
* Visual design
* Conceptual/big picture ideas

*Opportunities:*

* Giving up control
* Frustration when I can’t see the bigger picture
* Limited bandwidth right now

How do our individual accountabilities impact each other?

**6. Mutual Expectations**

What specific behaviors do we want and expect of each other

* Maintain high level of engagement in team communications and opportunities to provide feedback (meetings, email, review, etc.)
* Be specific with dates, times, who is responsible, etc. when asking for input or feedback
  + Team will respond within set parameters
* All are willing to compromise to keep project moving forward
* Honesty about capacity to do work – it will not be equal contribution ALL the time; heavy lifting will come from all team members throughout project
  + Commit to, on average, a minimum of 4 hours per week towards Sr. PM project work.

What behaviors would negatively impact our working relationship?

* Missing multiple meetings
* Not contributing “fairly”
* Not being willing to negotiate/compromise on a topic

What is the best way to give each other feedback?

* Let’s do check in’s during our team meetings - What worked well and what can be improved upon?
* Allow team members to indicate their preferences for receiving feedback, and provide it in a way that is most useful to the person receiving it.

Team Member Feedback Preferences:

**Jason** – Prefer one-on-one settings for feedback.

**Jess** – Fine with being addressed in group setting or one on one, whatever is more comfortable as long as it’s done respectfully.

**Dana --** Please send Hedwig.  If he is unavailable email, phone calls, IM and flowers are all acceptable.

**Darrell**

**Barb –** Prefer email over phone calls as I spend a ton of time in meetings and on calls throughout the day**.** IM via skype is good as well as I can respond while I am on other calls/meetings

**7. Operating Procedures**

***Team Meetings***

How often will we meet? For how long? When and where?

* All group meeting will occur at least once a week as a foundation
* The team and/or sub groups can make decisions on additional meetings if/when needed.

How will we develop meeting agendas?

* Darrell will provide meeting agendas
* Everyone should provide Darrell with any topics or data that need to reviewed by the group each week

Who will lead or facilitate our meetings?

* Jess will organize and plan our meetings
* Darrell will provide meeting agendas
* Meetings will be facilitated by various team members as needed/determined.

How will we keep track of our decisions and agreed-upon actions?

* Let’s assign a note taker for each meeting and add the notes and actions to our box
* Email a project tracker with key deliverables and status updates to keep these items top of mind.

***Communication***

What is the best way to communicate with each other and keep each other informed?

* Regular group communications – Email seems to be the best communication channel.
* Meetings – Conference call, WebEx, or Skype depending on situation/need.
* One-on-one – Email, phone, or IM, depending on situation/personal preferences.

Alternate Contact Information

How quickly do we agree to return phone calls/emails?

* Set “deadlines” - the person who is asking for the response will ask for a return by date.
* Group communication is a priority and we should do our best to be timely.

How and what will we communicate to our key stakeholders?

* Conference calls
* Skype
* WebEx

***Decision-Making***

What will be our primary decision-making method?

* Democratic with Majority Rules

What decisions will we make on our own?

* How to perform individual tasks.

What decisions will require agreement among all team members?

* Decisions that impact other team work

***Conflict***

How will we resolve disagreements?

* Vet disagreement with project team; majority 3-2 vote to resolve
* Feedback without side effects model in addressing indifference
* Provide feedback via person’s preferred method.

How will we handle if we do not follow through on agreements?

* Notify team members with as much advance notice as possible

***Reflection***

How and when will we review and evaluate team performance?

* We should set milestones at key points during the project for doing this
* At the conclusion of the project